

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“There are major shifts taking place in the footwear market, as the non-specialists grow their share of spending, while the traditional out-of-town footwear format has been thrown into question.”

– Alice Goody, Retail Analyst

This report looks at the following areas:

- Where they shop for footwear online and in-store
- Attitudes to shopping for footwear

Additional questions were asked to consumers for the UK report.

This report series covers the footwear market in five large Western European countries – the UK, France, Germany, Italy and Spain. The focus of the reports is on the footwear specialists. The non-specialists, such as department stores, are not covered in detail although they are looked at briefly in the Channels of Distribution sections and also in our consumer research.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

Definition

Financial definitions

Abbreviations

VAT around Europe

Figure 1: VAT rates around Europe, 2011-16

Executive Summary – Europe – The Market

Market size

Figure 2: Europe: Spending on footwear, 2011-15

Figure 3: Europe: Average annual growth in spending on footwear, 2011-15

Figure 4: Europe: Footwear, Share of consumer spending, by country, 2015

Figure 5: Europe: Footwear, Share of total clothing and footwear spend, by country, 2015

Sector size and forecast

Figure 6: Europe: Footwear specialists' sales, excl. VAT, by country, 2011-16

Figure 7: Europe: Footwear specialists' sales, forecasts, by country, excl. VAT, 2017-21

Figure 8: Europe: Footwear specialists sales relative to all spending on footwear, by country, 2015

Leading retailers

What lies ahead for shoe retailers?

Figure 9: Europe: Leading specialist footwear retailers, Sales, 2013/14-2016/17

Figure 10: Europe: Leading specialist footwear retailers, Outlets, 2013/14-2016/17

Figure 11: Europe: Leading specialist footwear retailers, Sales per outlet, 2013/14-2016/17

Market shares

Figure 12: Europe: Leading specialist footwear retailers: Shares of spending on footwear, 2013-15

Online

Online shoppers

Figure 13: Europe: Percentage shopping online in the last three months, 2016

Online spending

Figure 14: Europe: Estimated online sales of footwear in the major economies, 2016

Figure 15: Europe: Estimated online sales of footwear in the major economies as a proportion of all footwear spending, 2016

What we think

Executive Summary – Europe – The Consumer

Who shops for footwear?

Figure 16: Europe: Percentage buying footwear for themselves over the last 12 months, in-store or online (net), by country, February 2017

In-store vs online

Figure 17: Europe: Where they shop for footwear, in-store vs online, by country, February 2017

Specialists vs non-specialists

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 18: Europe: Where they shop for footwear, in-store or online, net of all specialists and non-specialists, by country, February 2017

Where they shop for footwear

Figure 19: Europe: Where they shop for footwear, in-store or online, by country, February 2017

Attitudes to shopping for footwear

Figure 20: Europe: Attitudes to shopping for footwear, by country, February 2017

Interest in footwear retail innovations

Figure 21: Europe: Attitudes to shopping for footwear, by country, February 2017

UK has least engaged consumers

Figure 22: Europe: Country ranking of percentage agreeing with attitudes to footwear retailing, February 2017

Executive Summary – Europe – Innovation and Launch Activity

Custom made footwear

Made in France

Footwear robots

CamperLab concept stores

Deichmann rolls out new store formats

GPS sneakers

Figure 23: EasyJet Sneakairs prototype, 2016

Footwear collaborations

Figure 24: Afew x Diadora highly addictive sneakers, 2017

Figure 25: Christopher Kane Crocs Collaboration, 2017

France

Overview

What you need to know

Areas covered in this report

Executive Summary

The market

Market size

Figure 26: France: Consumer spending on footwear (incl. VAT), 2012-16

Channels of distribution

Figure 27: France: Estimated channels of distribution for footwear spending, 2015/16

Sector size and forecast

Leading players

Key metrics

Figure 28: France: Leading footwear specialists: Compound annual growth rates in sales, 2013-16

Market shares

Figure 29: France: Leading specialist footwear retailers: Estimated shares of specialist footwear retailers' sales, 2016

Online

The consumer

Who shops for footwear

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 30: France: Who has bought footwear for themselves over the last 12 months either in-store or online, by gender and age, February 2017

Where they shop for footwear

Figure 31: France: Where they shop for footwear, in-store or online, February 2017

Attitudes to shopping for footwear

Figure 32: France: Profile of those who agree with attitude statements, February 2017

What we think

Issues and insights

Digital integration is essential for store-based footwear retailers

The facts

The implications

What opportunities are there for growth?

The facts

The implications

The Market - What You Need to Know

French economy still sluggish

Footwear spending – Volumes down, growth driven by price rises

Specialists capture less than half of spending

Stagnation in specialist retailers' sales

Market size

Economic growth is sluggish

Market size and trend

Figure 33: France: Consumer spending on footwear and clothing (incl. VAT), 2012-16

Figure 34: France: Index of volume spending on footwear and clothing, (previous year=100), 2011-15

Inflation

Figure 35: France: Consumer prices, annual % change, 2012-16

Figure 36: France: Consumer price inflation on footwear, clothing and all items, annual % change, July 2015-December 2016

Market segmentation

Figure 37: France: Consumer spending on footwear by segment, 2014-15

Channels of distribution

Figure 38: France: Where they shop for footwear, February 2017

Specialists dominate

Specialist sports shops

Fashion chains growing their complementary offer

Hypermarkets strong at lower end of the market

Online expanding fast

Figure 39: France: Estimated channels of distribution for footwear spending, 2015/16

Sector size and forecast

Spending volumes and inflation both down

2016 a grim year

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Other channels encroaching on sales

Figure 40: France: Footwear specialists' sales, excl VAT, 2011-16

Figure 41: France: Footwear specialists' sales, forecasts, excl VAT, 2017-21

Leading players – What you need to know

Specialist footwear is concentrated and dominated by two groups

Competition from other channels is leading to over-supply

Structural change

Vivarte still leads

France home to two large footwear online specialists

Leading players

A concentrated and near saturated sector

Competition from other channels causing structural changes

Future of Vivarte unclear

Bata has disappeared

Sports footwear chains thriving

Deichmann to enter the market

Figure 42: France: Leading specialist footwear retailers, Sales, 2013-16

Figure 43: France: Leading specialist footwear retailers, Outlet numbers, 2015-16

Figure 44: France: Leading specialist footwear retailers, Estimated sales per outlet, 2016

Market shares

Figure 45: France: Leading specialist footwear retailers: Shares of specialist footwear retailers' sales, 2013-16

Online

Online activity and device usage

Shopping online

Figure 46: France: Percentage buying online in last 12 months, 2011-16

Online sales

Leading online players

Sarenza

Spartoo

Other retailers

Figure 47: France: Estimated sales of footwear online by leading retailers, 2015/16

The consumer – What you need to know

Over 80% buy footwear every year

Specialists the most popular channel, with sports shops close behind

Almost half had shopped online for footwear

Store-based retailers popular, but specialists underperforming

Amazon is the largest, but not the only online-only retailer

Comfort and quality are top priorities when buying shoes

Who shops for footwear

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Over 80% had bought over the last year, women buy more

Figure 48: France: Who has bought footwear for themselves over the last 12 months, by gender, February 2017

Figure 49: France: Who has bought footwear for themselves over the last 12 months either in-store or online, by gender and age, February 2017

Where they shop for footwear

Figure 50: France: Where they shop for footwear, in-store or online, February 2017

Shopping in-store

Specialist stores have many advantages

Footwear complements fashion retailers' offer

Supermarkets at the lower end

Limited presence of department stores

Figure 51: France: Where they shop for footwear in-store, by gender, February 2017

Figure 52: France: Where they shop for footwear in-store, by gender and age, February 2017

Figure 53: France: Profile of those who had bought footwear in-store, by type of retailer used, February 2017

Shopping online

Footwear well developed online

Store-based retailers popular, but specialists underperforming

Online and in-store must be integrated

Amazon is the largest, but not the only online-only retailer

Figure 54: France: Where they shop for footwear online, by gender, February 2017

Figure 55: France: Where they shop for footwear online, by age and gender, February 2017

Figure 56: France: Profile of those who had bought footwear online, by type of retailer used, February 2017

Attitudes to shopping for footwear

Comfort and quality are top priorities

Retailers can help with shoe fitting

Figure 57: France: Attitudes to shopping for footwear, February 2017

How to appeal to older footwear buyers

Interest in "green" footwear and services to make shoes last

Personalising shoes would be popular with the young

Wearable technology in footwear

Figure 58: France: Attitudes to shopping for footwear, by age and gender, February 2017

Figure 59: France: Attitudes to shopping for footwear, by age and gender, February 2017

Figure 60: France: Profile of those who agree with attitudes statements, February 2017

Reasons for shopping crossed by individual retailer

Figure 61: France: Attitudes to shopping for footwear, by retailer used, February 2017

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Data sources

Germany

Overview

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

What you need to know

Areas covered in this report

Executive Summary

The market

Spending and inflation

Figure 62: Germany: Consumer spending on footwear (incl. VAT), 2012-16

Figure 63: Germany: Consumer prices, annual % change, July 2015 –January 2017

Figure 64: Germany: Consumer spending on footwear (inc VAT) by segment, 2015

Channels of distribution

Figure 65: Germany: Estimated channels of distribution for footwear spending, 2016

Sector size and forecast

Figure 66: Germany: Footwear specialists' sales growth, excl VAT, 2012-16

Leading players

Key metrics

Market shares

Figure 67: Germany: Leading specialist footwear retailers: Shares of specialist footwear retailers' sales, 2014-16

Online

The consumer

Where and how they shop for footwear

Figure 68: Germany: Where they shop for footwear, in-store or online, February 2017

Attitudes to shopping for footwear

Figure 69: Germany: Attitudes to shopping for footwear, February 2017

What we think

Issues and insights

Footwear specialists outshine the market

The facts

The implications

Amazon and the pureplays pose the greatest competition

The facts

The implications

The market - What you need to know

Footwear spending picks up in 2016

Pureplays grow their share of spending

Clothing specialists lose share

Specialists outperform the market

Market size

Solid economic performance

Footwear spending grows ahead of clothing

Figure 70: Germany: Consumer spending on footwear and clothing (incl. VAT), 2012-16

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Inflation

Figure 71: Germany: Consumer prices, annual % change, 2012-16

Figure 72: Germany: Consumer prices, annual % change, July 2015 –January 2017

Market segmentation

Figure 73: Germany: Consumer spending on footwear (inc VAT) by segment, 2015

Channels of distribution

Specialists dominate the market

Figure 74: Germany: Estimated channels of distribution for footwear spending, 2016

Sector size and forecast

Footwear specialists' sales growth accelerates

Figure 75: Germany: Footwear specialists' sales, excl VAT, 2012-16

Figure 76: Germany: Footwear specialists' sales, Forecasts, excl VAT, 2017-21

Leading players – What you need to know

Specialists invest in multichannel developments

Deichmann the market leader

Rising demand for footwear online

Otto the biggest retailer for shoes online

Leading players

Deichmann surging ahead

Görtz implements restructuring and refurbishments

Foot Locker failing to keep pace

Consolidation

Polish discounter CCC gains foothold

Figure 77: Germany: Leading specialist footwear retailers, Sales, 2014-16

Figure 78: Germany: Leading specialist footwear retailers, Outlet numbers, 2014-16

Figure 79: Germany: Leading specialist footwear retailers, Sales per outlet, 2014-16

Market shares

Figure 80: Germany: Leading specialist footwear retailers: Shares of specialist footwear retailers' sales, 2014-16

Online

Online activity and device usage

Shopping online

Figure 81: Germany: Percentage buying online in last 12 months, 2011-16

Online sales

Figure 82: Germany: Online sales of clothing and footwear, incl. VAT, 2014-16

Leading online players

Figure 83: Germany: Leading online footwear retailers, 2015-16

The consumer – What you need to know

Close to nine in ten buy footwear

Specialists the preferred retailer

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Amazon comes second to only the specialists

Comfort and quality over fashion and price

Unseasonal weather hampers German shoe spending

Who shops for footwear

Figure 84: Germany: Who has bought footwear for themselves over the last 12 months, by gender and age, February 2017

Young men the most likely to buy shoes online

Figure 85: Germany: Who has bought footwear for themselves over the last 12 months, in-store or online, by gender and age, February 2017

Where they shop for footwear

Specialist footwear retailers dominate

Figure 86: Germany: Where they shop for footwear, net in-store or online, February 2017

Amazon is the top online retailer

Figure 87: Germany: Where they shop for footwear, in-store or online, February 2017

Figure 88: Germany: Where young shoppers buy footwear online, February 2017

Non-specialists hold most appeal among the young

Independent shoe stores attract an older demographic

Figure 89: Germany: Profile of those who had bought footwear in-store or online, by type of retailer used, February 2017

Attitudes to shopping for footwear

Comfort and quality over fashion and price

Figure 90: Germany: Attitudes to shopping for footwear, February 2017

Made in Germany lacks esteem

Finding a solution to fit

Unseasonal weather hampers German shoe spending

Figure 91: Germany: Attitudes to shopping for footwear, February 2017

Supermarket shoppers value comfort and low prices

Figure 92: Germany: Attitudes to shopping for footwear, crossed by where they shop for footwear net online and in-store, February 2017

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

Italy

Overview

What you need to know

Areas covered in this report

Executive Summary

The market

Spending and inflation

Figure 93: Italy: Consumer spending on clothing and footwear (incl. VAT), 2012-16

Channels of distribution

Figure 94: Italy: Estimated channels of distribution for footwear spending, 2015/16

Sector size and forecast

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Leading players

Figure 95: Italy: Leading footwear specialists: Compound annual growth rates in net revenues, 2013-15

Market shares

Figure 96: Italy: Leading specialist footwear retailers: Shares of specialist footwear retailers' sales, 2015

Online

The consumer

Who shops for footwear

Figure 97: Italy: Who has bought footwear for themselves over the last 12 months, in-store or online, by gender, February 2017

Where they shop for footwear

Figure 98: Italy: Where they shop for footwear, in-store or online, February 2017

Attitudes to shopping for footwear

Figure 99: Italy: Attitudes to shopping for footwear, February 2017

What we think

Issues and insights

Footwear retailing in Italy is changing

The facts

The implications

Opportunities for retailers in Italy's developing retail economy

The facts

The implications

The market - What you need to know

The economy is growing, moderately

Footwear more resilient than clothing

Footwear specialists account for 70% of distribution

Footwear specialists proving resilient

Market size

Slow economic growth

Market size and trend

Figure 100: Italy: Consumer spending on footwear and clothing (incl. VAT), 2012-16

Figure 101: Italy: Index of volume spending on footwear and clothing, (Previous year=100), 2011-15

Inflation

Figure 102: Italy: Consumer prices, annual % change, 2012-16

Figure 103: Italy: Consumer price inflation on footwear, clothing and all items annual % change, July 2015-December 2016

Market segmentation

Figure 104: Italy: Consumer spending on footwear (incl. VAT), 2012-20

Figure 105: Italy: Consumer spending on footwear by segment, 2012-15

Channels of distribution

Figure 106: Italy: Where they shop for footwear, in-store or online, February 2017

Footwear specialists account for 70% of distribution

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Sports retailers

Clothing/fashion retailers

Hypermarkets and supermarkets

Department stores

Online retailers

Figure 107: Italy: Estimated channels of distribution for footwear spending, 2015/16

Sector size and forecast

Specialists proving resilient

Other channels may increase share

Figure 108: Italy: Estimated footwear specialists' sales, excl VAT, 2011-16

Figure 109: Italy: Clothing and footwear specialists' sales, Forecasts, excl VAT, 2017-21

Leading players – What you need to know

Globo leads in sales, but Bata has most stores

Busy mass market

Foot Locker growing

A fragmented market, but consolidation in progress

Online undeveloped but growing via the mobile channel

Specialists missing out online

Leading players

Globo leads

Bata still strong

PittaRosso and Pittarello – Similar but different chains

Geox

Tods

Deichmann

Specialist sports footwear shops expanding

Vergelio – Small but part of the Percassi group

Figure 110: Italy: Leading specialist footwear retailers, Sales, 2013-15

Figure 111: Italy: Leading specialist footwear retailers, Outlet numbers, 2016/17

Market shares

Figure 112: Italy: Leading specialist footwear retailers: Shares of specialist footwear retailers' sales, 2013-15

Online

Online activity and device usage

Shopping online

Figure 113: Italy: Percentage buying online in last 12 months, 2011-16

Online sales

Online market leaders

The consumer – What you need to know

Footwear shopping near ubiquitous; online well established

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Specialists and independents are the most popular channels

Online only retailers well established, Amazon leads

Footwear specialists lagging online

Comfort and quality are top priorities

To appeal to the young.....

To appeal to the affluent.....

Who shops for footwear

Over 90% had bought over the last year, women buy more

Figure 114: Italy: Who has bought footwear for themselves over the last 12 months, by gender, February 2017

Where they shop for footwear

Specialists and independents the most popular channels

Online-only retailers well established, Amazon leads

Figure 115: Italy: Where they shop for footwear, in-store or online, February 2017

Shopping in-store

Specialists and independents dominate

Sports shops in third place, more popular with men

Figure 116: Italy: Where they shop for footwear in-store, by gender, February 2017

Figure 117: Italy: Where they shop for footwear in-store, by age, February 2017

Figure 118: Italy: Where they shop for footwear in-store, by gender and age, February 2017

Figure 120: Italy: Profile of those who had bought footwear in-store, by type of retailer used, February 2017

Shopping online

Online-only retailers just ahead of the store-based retailers

But footwear specialists lag behind other retailers online

Amazon the largest single retailer

Figure 121: Italy: Where they shop for footwear online, by gender, February 2017

Figure 122: Italy: Where they shop for footwear online, by age and gender, February 2017

Figure 123: Italy: Profile of those who had bought footwear online, by type of retailer used, February 2017

Attitudes to shopping for footwear

Comfort and quality are top priorities

Figure 124: Italy: Attitudes to shopping for footwear, February 2017

Opportunity for stores to promote help with shoe fitting

"Made in Italy" a big draw

Wide variation in perception that leather means quality

Interest in sustainably-made footwear and services to make shoes last high amongst young women

Figure 125: Italy: Attitudes to shopping for footwear, by age and gender, February 2017

Figure 126: Italy: Attitudes to shopping for footwear, by age and gender, February 2017

Figure 127: Italy: Profile of those who agree with attitudes statements, February 2017

Reasons for shopping crossed by individual retailer

Figure 128: Italy: Attitudes to shopping for footwear, by retailer used, February 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Appendix - Data Sources, Abbreviations and Supporting Information

Abbreviations

Data sources

Spain

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending and inflation

Figure 129: Spain: Consumer spending on footwear (incl VAT), 2012-16

Channels of distribution

Figure 130: Spain: Estimated channels of distribution for footwear spending, 2016

Sector size and forecast

Leading players

Key metrics

Market shares

Figure 131: Spain: Leading specialist footwear retailers: Shares of specialist footwear retailers' sales, 2016

Online

The consumer

Where they shop for footwear

Figure 132: Spain: Where they shop for footwear, in-store or online, February 2017

Attitudes to shopping for footwear

Figure 133: Spain: Attitudes to shopping for footwear, February 2017

What we think

Issues and insights

Fragmented market dominated by the non-specialists

The facts

The implications

How can the specialists better compete?

The facts

The implications

The market - What you need to know

Consumer spending on footwear on the rise

Women's footwear the biggest area of spend

Inflation boosts value sales

Non-specialists take a growing share

Sales through footwear retailers decline 3.1%

Market size

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Improving Spanish economy

Footwear spending grows ahead of clothing

Figure 134: Spain: Consumer spending on clothing and footwear (incl VAT), 2012-16

Inflation

Figure 135: Spain: Consumer prices, Annual % change, 2012-16

Figure 136: Spain: Consumer price inflation on clothing, footwear and all items, annual % change, August 2015-December 2016

Market segmentation

Figure 137: Spain: Consumer spending on footwear (inc VAT) by segment, 2015

Channels of distribution

Specialists lose share

Sports stores take a growing share

Tempe's enormity puts the specialists in perspective

El Corte Inglés an important player in Spain

Online retailers a growing force

Figure 138: Spain: Estimated channels of distribution for footwear spending, 2016

Sector size and forecast

Footwear specialists are in decline

Figure 139: Spain: Footwear specialists' sales, excl VAT, 2012-16

Figure 140: Spain: Footwear retailers' sales, Forecasts, excl VAT, 2017-21

Leading players - What you need to know

Deichmann surpasses 50 stores in Spain

Merkal develops city centre presence to offset stagnating growth

Marypaz loses market share

Online market catches up with the rest of Europe

Leading players

Merkal gets back on track for growth

Marypaz in decline

Camper modernises brand image

Figure 141: Spain: Leading specialist footwear retailers, Sales, 2014-16

Deichmann puts pressure on the Spanish chains

Figure 142: Spain: Leading specialist footwear retailers, Outlet numbers, 2014-16

Figure 143: Spain: Leading specialist footwear retailers, Sales per outlet, 2014-16

Market shares

Figure 144: Spain: Leading specialist footwear retailers: Shares of specialist footwear retailers' sales, 2014-16

Figure 145: Spain: Leading specialist footwear retailers: Shares of specialist footwear retailers' sales, 2016

Online

Online activity and device usage

Shopping online

Figure 146: Spain: Percentage buying online in last 12 months, 2011-16

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Online market leaders

Figure 147: Spain: Estimated sales of footwear online by leading retailers, 2014-16

The consumer – What you need to know

Young women the biggest buyers

Specialists less popular than the non-specialists

Clothing retailers favoured by the young

Older shoppers see the value in trading up on footwear

Young consumers lead shift in attitude towards trainers

Who shops for footwear

Young women the biggest buyers

Figure 148: Spain: Who has bought footwear for themselves over the last 12 months, by age and gender, February 2017

Age split between online purchasing

Figure 149: Spain: Who has bought footwear for themselves over the last 12 months, in-store or online, by age and gender, February 2017

Where they shop for footwear

Non-specialists attract more shoppers than specialists

Figure 150: Spain: Where they shop for footwear, net in-store or online, February 2017

Sports and clothing retailers favoured by the young

Figure 151: Spain: Where they shop for footwear, net in-store or online, by age, February 2017

Amazon leads online

Room for growth at Zalando

Figure 152: Spain: Where they shop for footwear, in-store or online, February 2017

Above-average earners shop at El Corte Inglés

Figure 153: Spain: Profile of footwear shoppers by type of retailer used, February 2017

Attitudes to shopping for footwear

Older shoppers see the value in trading up on footwear

Figure 154: Spain: Attitudes to shopping for footwear, February 2017

Fit remains a key issue

Figure 155: Spain: Attitudes to shopping for footwear, February 2017

Young consumers lead shift in attitude towards trainers

Figure 156: Spain: Attitudes to shopping for footwear, by age, February 2017

Online shoppers keen on personalised footwear

Figure 157: Spain: Attitudes to shopping for footwear, by where footwear has been purchased from, February 2017

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Data sources

UK

Overview

What you need to know

Products covered in this Report

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Executive Summary

The market

Footwear grows 4.5% in 2016

Figure 158: UK footwear sales, best- and worst-case forecast, 2011-21

Men's footwear outperforming

Figure 159: UK footwear sales segmented by women's, men's and children's, % share, 2016 (est)

Companies and brands

Fashion specialists outperform the market

Figure 160: Estimated market shares for top 10 retailers of footwear, 2016

Clarks is worth paying more for

Figure 161: Attitudes towards and usage of selected brands, March 2017

Reimagining the in-store experience with technology

The consumer

Sports stores remain popular for footwear

Figure 162: Retailers from where consumers have bought footwear in the last 12 months, in-store and online, February 2017

Mothers more likely than fathers to buy shoes for kids

Figure 163: Who footwear has been purchased for, February 2017

Young women drive sales of trainers

Figure 164: Percentage of women who have bought shoes from each shoe category, February 2017

Men opt for casual shoes

Figure 165: Percentage of men who have bought shoes from each shoe category, February 2017

Men buy new shoes driven by fashion

Figure 166: Reasons for buying footwear in the last 12 months, February 2017

Women aged under-45 look for comfort over fashion

Figure 167: Agreement with attitudes towards buying footwear, February 2017

What we think

Issues and insights

What demographics are driving growth in footwear?

The facts

The implications

What are the opportunities for growth?

The facts

The implications

Who are the winners and losers in footwear?

The facts

The implications

The market

What you need to know

Footwear grows 4.5% in 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Footwear to grow 23% by 2021

Men's footwear outperforming

Consumer spending on footwear rises 6.2% in 2016

Footwear prices fall into deflation in early 2017

Footwear specialists lose share of consumer spending

Market size and forecast

Footwear grows 4.5% in 2016

Figure 168: UK footwear sales, best- and worst-case forecast, 2011-21

Footwear to grow 23% by 2021

Figure 169: UK footwear sales, at current prices, 2011-21

Men's footwear outperforming

Figure 170: UK footwear sales, segmented by market value and percentage share, 2016 (est)

Figure 171: UK footwear sales, segmented by women's, men's and children's, % share, 2016 (est)

Forecast methodology

Market drivers

Mintel's Fashion Tracker

Figure 172: Spending habits on fashion, by gender, April 2016

Consumer spending on footwear grows 6.2%

Figure 173: Consumer spending on clothing and footwear, current prices non-seasonally adjusted, (including VAT), 2012-16

Footwear prices fall in first two months of 2017

Figure 174: Consumer prices index annual % change for footwear, clothing and all items, February 2016-February 2017

Population trends

Figure 175: Trends in the age structure of the UK population, 2011-21

Figure 176: Trends in the age structure of the UK population, 2011-21

Channels to market

Footwear specialists account for 44% of market

Figure 177: Estimated distribution of spending on footwear, by type of retailer, 2016

Figure 178: Estimated distribution of spending on footwear, by type of retailer, 2014-16

Key players

What you need to know

Fashion specialists outperform the market

Brantano continues to struggle

Clarks sales rise, but loses market share

JD Sports is now the leading non-specialist

Online footwear sales continue to rise

Launch activity and innovation

Expanding store portfolios

Adding a personal touch in-store

Figure 179: Duke + Dexter, London, 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Nike moves towards digital design

Helping consumers disconnect

Figure 180: Anatomic & Co. In Good Company Shoes, 2017

Aerosoles relaunch

Fabric innovation

Collaborations

Reimagining the in-store experience with technology

Figure 181: Aldo Connected Store in New York, 2017

Retailers tap into consumer nostalgia

Using services to highlight expertise

Non-specialists up the ante

Inclusive footwear

Figure 182: Kahmune footwear, 2017

Foot Locker's in-store audio tours

Leading specialists

Fashion retailers outperform

Figure 183: Leading footwear specialists: UK revenues, 2012-16

Retailers review store portfolios in difficult trading climate

Figure 184: Leading footwear specialists: UK outlet numbers, 2012-16

Sales per outlet

Figure 185: Leading footwear specialists: estimated UK sales per outlet, 2012-16

Operating profits and margins

Figure 186: Leading footwear specialists: UK operating profits, 2012-16

Figure 187: Leading footwear specialists: UK operating margins, 2012-16

Leading non-specialist retailers

JD Sports' strong sales growth continues

Figure 188: Leading non-specialist retailers: estimated footwear sales, 2012-16

Consumer data

Retail offering

Figure 189: Leading non-specialist retailers; positioning, offer and brands stocked, April 2017

Market shares

UK footwear market continues to be fragmented

Figure 190: Estimated market shares for top 10 retailers of footwear, 2016

Figure 191: Estimated market shares for top 20 retailers of footwear, 2012-16

Online

Online sales of footwear forecast to reach £2.3 billion

Figure 192: Estimated online sales of footwear, 2013-17

Distribution: pureplays vs multichannel retailers

Figure 193: Estimated distribution of online sales, 2014-16

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Leading players

Figure 194: Leading online footwear retailers: estimated online sales and online market shares, 2014-16

Consumer research

Figure 195: Retailers from where consumers have bought footwear for themselves in the last 12 months online, May 2016 and February 2017

Space allocation summary

Specialists' space allocation summary

Figure 196: Specialist footwear retailers' space allocation estimates, March 2017

Specialists detailed space allocation estimates

Figure 197: Specialist footwear retailers' detailed space allocation estimates, March 2017

Non-specialists space allocation overview

Figure 198: Non-specialist retailers' footwear space allocation estimates, March 2017

Non-specialists detailed space allocation estimates

Figure 199: Non-specialist footwear retailers' detailed space allocation estimates, March 2017

Non-specialist footwear departments

Figure 200: Estimated in-store footwear as percentage of total selling space in non-specialist footwear retailers, March 2017

Advertising and marketing activity

Total sector advertising spend down 0.9% year-on-year in 2016

Figure 201: Total above-the-line, online display and direct mail advertising expenditure on footwear, 2013-16

Leading advertisers

Figure 202: Total above-the-line, online display and direct mail advertising expenditure on footwear, by leading advertiser, 2013-16

Nearly a third of total footwear advertising spend channelled through the press

Figure 203: Total above-the-line, online display and direct mail advertising expenditure on footwear, by media type, 2016

Nielsen Ad Intel coverage

Brand research

Brand map

Figure 204: Attitudes towards and usage of selected brands, March 2017

Key brand metrics

Figure 205: Key metrics for selected brands, March 2017

Brand attitudes: Shoe Zone offers good value

Figure 206: Attitudes, by brand, March 2017

Brand personality: Schuh benefits from vibrant image

Figure 207: Brand personality – Macro image, March 2017

Clarks seen as reliable but expensive

Figure 208: Brand personality – Micro image, March 2017

Brand analysis

Schuh attracts affluent, young shoppers

Figure 209: User profile of Schuh, March 2017

Office has a broad appeal

Figure 210: User profile of Office, March 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Clarks is worth paying more for

Figure 211: User profile of Clarks, March 2017

Russell & Bromley has a good reputation despite low usage

Figure 212: User profile of Russell & Bromley, March 2017

Pavers suffers from low brand awareness

Figure 213: User profile of Pavers, March 2017

Shoe Zone low prices erode trust

Figure 214: User profile of Shoe Zone, March 2017

The consumer

What you need to know

Sports stores remain popular for footwear

Amazon leads online

Mothers more likely than fathers to buy shoes for kids

Young women drive sales of trainers

Men opt for casual shoes

Men buy new shoes driven by fashion

Women treat themselves to shoes

Women aged under-45 look for comfort over fashion

Millennials interested in personalisation

Who shops where?

Sports stores lead for footwear

Figure 215: Retailers from where consumers have bought footwear for themselves in the last 12 months in-store or online, February 2017

Clarks attracts more men aged under-45

Figure 216: Retailers from where consumers have bought footwear for themselves in the last 12 months in-store or online, May 2016 and February 2017

Amazon leads online

Young women drive footwear sales in-store

Figure 217: Channels from where consumers have bought footwear in the last 12 months, by gender and age, February 2017

Young women shop around for shoes in-store

Figure 218: Repertoire of types of footwear retailers purchased from in-store or online, February 2017

Who footwear is bought for

20% of women buy shoes for partners

Figure 219: Who footwear has been purchased for, February 2017

Mothers more likely than fathers to buy shoes for kids

Types of footwear purchased

Flats remain popular for women aged 25+

Figure 220: Percentage of women who have bought shoes from each shoe category, February 2017

Heels make a comeback among young women

Young women drive sales of trainers

Figure 221: Percentage of men who have bought shoes from each shoe category, February 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Men opt for casual shoes

Trainers for men

Women aged 35-44 buy the most types of shoes

Figure 222: Consumers who have bought 3+ types of footwear in the last 12 months, by gender and age group, February 2017

Reasons for buying footwear

Men buy new shoes driven by fashion

Figure 223: Reasons for buying footwear in the last 12 months, February 2017

Women treat themselves to shoes

Unseasonal weather

Attitudes towards buying footwear

Women aged under-45 look for comfort over fashion

Figure 224: Agreement with attitudes towards buying footwear, February 2017

Millennials interested in personalisation

Solving problems with fit

Appendix – Data sources, abbreviations and supporting information

Abbreviations

Consumer research methodology

Appendix – Market size and forecast

Forecast methodology

Figure 225: UK footwear sales, best- and worst-case forecast, 2016-21

Brantano (UK)

What we think

Out-of-town stand-alone stores lack destination appeal

Edinburgh Woollen Mill Group bid rumours

Seamless payment experience across all sales channels

Company background

Company performance

Figure 226: Brantano (UK): group financial performance, 2012-16

Figure 227: Brantano (UK): outlet data, 2012-16

Retail offering

C&J Clark

What we think

Clarks brand still strong but needs to shift perceptions

Slow to latch on to Athleisure growth

A need to build a multichannel business

Reorganising to improve efficiency

Moving towards more structured promotional periods

Company background

Company performance

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 228: C&J Clark (UK): group financial performance, 2012/13-2016/17

Figure 229: C&J Clark (UK): outlet data, 2012/13-2016/17

Figure 230: C&J Clark: European stores outside UK & RoI, April 2017

Retail offering

Deichmann Schuh

What we think

Rack concept helps Deichmann stand out

Diversifying the brand portfolio

Expanding geographically

Omnichannel outlets merge shops and online

Ship2Home responds to customer disappointment

Ellie Goulding collection taps into celebrity interest

Where now?

Company background

Company performance

Figure 231: Deichmann Schuh: group financial performance, 2012-16

Figure 232: Deichmann Schuh: outlet data, 2012-16

Retail offering

Eram Group

What we think

Differentiated marketplace offering

Digitising stores

Expansion of exclusively female mid-priced city centre footwear concept

E-commerce enhancements boost web traffic and conversion rates

Low-priced competition squeezes discount brand Tati

Company background

Company performance

Figure 233: Eram Group: estimated sales performance, 2011-16

Figure 234: Eram Group: footwear store network by brand

Figure 235: Eram Group: estimated group outlet data, 2011-15

Retail offering

Ludwig Görtz

What we think

Lack of profitability hurts ability to invest

An opportunity for differentiation?

Exclusive brands potential

Where now?

Company background

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Footwear Retailing - Europe - April 2017

Report Price: £2895.00 | \$3597.04 | €3387.44

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company performance

Figure 236: Ludwig Görtz: group financial performance, 2011-15

Figure 237: Ludwig Görtz: outlet data, 2011-15

Retail offering

Schuh

What we think

Focusing on fashion

Investing in technology

Where now?

Company background

Company performance

Figure 238: Schuh (UK): group* financial performance, 2012/13-2016/17

Figure 239: Schuh (UK): outlet data, 2012/13-2016/17

Retail offering

Shoe Zone

What we think

Targeting out-of-town footwear market with new 'big-box' store concept

Expanding e-commerce coverage

Personalised online shopping experience

Extended product range revenue stream

Company background

Company performance

Figure 240: Shoe Zone Group Ltd: group financial performance, 2011/12-2015/16

Figure 241: Shoe Zone Group Ltd: outlet data, 2011/12-2015/16

Retail offering

Vivarte

What we think

Store digitising programme yielding positive results at La Halle aux Chaussures

Seeking growth opportunities outside home market

Appointment of Amazon.fr founder brings wealth of digital know-how to the group

Company background

Company performance

Figure 242: Vivarte: group sales performance (excl. VAT), 2011/12-2015/16

Figure 243: Vivarte: approximate footwear store numbers, 2015/16-2016/17

Retail offering

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com